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ABSTRACT

The purpose of this paper is to present a 50-item instrument (Appendix B) designed to assess needs for elementary school substitutes. Its use may provide valuable information for inservice training of substitute teachers, the often neglected cadre of professional educators. A priori and a posteriori validation procedures are described. A factor analysis of 312 responses corroborated the existence of nine underlying factors reasonably congruent to the following nine subscales: (1) student information, (2) community characteristics, (3) building staff personnel, (4) school philosophy and policies, (5) school building physical facilities, (6) district and/or building procedures, (7) curriculum and instruction, (8) lesson plans, and (9) classroom discipline. A test-retest reliability index of .91 was calculated from the initial validation research. (Author/PN)

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THE ELEMENTARY SUBSTITUTE TEACHER QUESTIONNAIRE

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Abstract

The purpose of this paper is to present a new instrument designed to assess needs for elementary school substitutes. Its use may provide valuable information for inservice training of substitute teachers, the often neglected cadre of professional educators. A priori and a posteriori validation procedures are described. A factor analysis of 312 responses pretty much corroborated the existence of nine underlying factors reasonably congruent to the nine subscales. A test-retest reliability index of .91 was calculated from the initial validation research.

THE ELEMENTARY SUBSTITUTE

TEACHER QUESTIONNAIRE

A review of the literature (Mastrian, 1984) revealed that there was no practical instrument to assess the needs of substitute teachers at the elementary school level. The literature, however, is replete with suggestions related to substitute teaching needs and concerns, particularly at the elementary level. These needs and concerns were collated and put into a nine category outline (appendix A) from which 56 items were developed. The outline served as a table of specifications and provided the a priori content validity basis of the new instrument.

After the 56 items were constructed, a panel of experts was selected to review the instrument and make judgments concerning content validity from a logical analysis of items and their mapping onto the needs and concern outline serving as the table of specifications. The panel consisted of Mr. Terry Samuels, past president of the Ohio Association of Elementary School Administrators; Dr. Edward Semple, Jr., Principal in the Garrettsville Elementary School system; Dr. James French, Federal Assistance Director, Youngstown City Schools; and Dr. Pietro J. Pascale, Professor of Statistics and Research Design at Youngstown State University. The suggestions and comments presented by the panel of experts were incorporated into the survey instrument resulting in a final draft of a 50-item instrument which is included in Appendix B.

Table 1 shows the nine major categories, each of which can be construed as subscales along with the corresponding survey items related to each of the nine subscales. For example, items 1, 7, 14, and 45 are assessing various aspects of student information. An underlined survey item number indicates that the item appears on more than one subscale.

Response format was a 5 point scale consisting of the following descriptive labels: extremely important, very important, of some importance, of little importance, of no importance - - with the corresponding numerical values of 5, 4, 3, 2, and 1. Furthermore, it was decided to have two dimensions of response to each of the questionnaire items: one dimension dealing with Importance of the information, and the other dimension dealing with the Adequacy of the information or assistance provided for the substitute teacher by the administrator. It is suggested that a discrepancy evaluation be performed by subtracting the adequacy scores from the importance scores (D = I-A). The discrepancy scores can be calculated on the individual items and on the nine subscales as well.

Three hundred twelve elementary school substitute teachers responded to the 50 item questionnaire in the initial validation sample. A principal components analysis of the 50 items followed by a varimax rotation was conducted by using the 312 complete sets of data. The factor analysis yielded nine eigenvalues greater than 1.0 accounting for about 76% of the variance. The factor loadings did not in all cases match the a priori placement of items under broad categories (subscales), although the existence of nine underlying factors corroborated to some extent the conceptualization by the panel of judges of the nine broad categories taken from the research literature.

Twenty substitute teachers volunteered to respond a second time to the questionnaire after a three week break from their initial responses. A test-retest procedure was thus used to generate a reliability coefficient of .91

TABLE A

GENERAL CATEGORIES PERTAINING TO INFORMATION
FOR SUBSTITUTE TEACHERS

	Subscales	Survey Item Numbers
I.	Student Information	1, 7, 14, 45
II.	Community Characteristics	2, 4, 49
III.	Building Staff Personnel	8, 23, 26, 27, 40
IV.	School Philosophy and Policies	3, 9, 10, 13, 21, 26, 11, 28, 30, 33, 35, 37, 39, 42, 46, 48
V.	School Building Physical Facilities	5, 6, 15, 16, 25
VI.	District and/or Building Procedures	12, 17, 19, 20, 24, 31, 37, 43, 46, 50
VII.	Curriculum and Instruction	32, 36, 41, 44
VIII.	Lesson Plans	18, 29, 34, 36, 38, 45
IX.	Classroom Discipline	22, 47

APPENDIX A

CONCERNS AND NEEDS RELATED TO SUBSTITUTE TEACHERS

I. Information Concerning Students

- A. Medical
  1. Physical disabilities
  2. Emotional disabilities
  3. Mental disabilities
- B. Intellectual
  1. Mental ability
  2. Academic achievement
  3. Basic skills mastery

II. Community Characteristics

- A. Type of community
  1. Urban
  2. Suburban
  3. Rural
  4. Inter-city
- B. Socioeconomic make-up
  1. Industrial
  2. Agricultural
  3. Residential/professional
- C. Parental support
  1. Cultural norms
  2. Parental expectations
  3. Parent-teacher groups

III. Staff Personnel

- A. Administration
  1. Building principal
  2. Head teacher
  3. Supervisor
- B. Support personnel
  1. Janitor
  2. Cafeteria workers
  3. Nurse
  4. Librarian
  5. Art teacher

B. Support personnel (continued)

6. Gym teacher
7. Special education teachers
8. School psychologist
9. Guidance personnel

C. Secretary
1. Volunteer helpers
2. Student help

D. Rapport
1. Greetings/introductions
2. Teacher-helper
3. Formal/informal gatherings

IV. School Policies/Philosphy

A. Board policies
1. District goals, philosophy
2. District policies on discipline/ punishment
3. Legal liabilities and responsibilities

B. Personal concerns of the substitute
1. Notification of work
2. Hours of work during the day
3. Salary and compensation
4. Fringe benefits
5. Payroll dates
6. Professional status

C. Staff development
1. Orientation sessions
2. Substitute sessions
3. In-service programs
4. Workshops, special training

D. Role expectation of substitute
1. Administration
2. Classroom teacher

V. School Facilities

A. School locations
1. City map
2. School district building locations

B. Building facilities
   1. Individual building floor plan
   2. Room locations
      a. Office
      b. Classrooms
      c. Lounge
      d. Restrooms
      e. Cafeteria
      f. Library
      g. Nurse's office
      h. Special areas

C. Instructional equipment
   1. Duplicating and copying equipment
   2. Supplies for duplicating

D. External areas
   1. Parking areas for teaching staff
   2. Playground areas
   3. Bus pickup and delivery areas
   4. Outside study areas

E. Safety drills
   1. Fire exits
   2. Disaster procedures

VI. School Building Procedures

A. Time schedules
   1. Late time
   2. Dismissal time
   3. Bus schedules
   4. Recess
   5. Lunch
   6. Support service schedules

B. Clerical activities
   1. Collecting lunch money
   2. Ticket and special activity money
   3. Attendance and absentee reports

C. Sign-in procedures
   1. Where
   2. What time
   3. To whom

D. Reports
   1. Homework
   2. Evaluation feedback to administrator and/or teacher
   3. Grade reporting
   4. Discipline

E. Substitute teacher handbook/guide

VII. Curriculum

A. Grade level
   1. Course description
   2. Sequence identified
   3. Activities listed

B. Special classes
   1. Team teaching
   2. Student exchange

C. Extended resources
   1. School library
   2. Learning centers
   3. Planetarium

VIII. Lesson plans

A. Location
   1. Office (administration)
   2. Classroom

B. Seating charts
   1. Teacher's desk
   2. Reliable students
   3. Disciplinary possibilities

C. Feedback
   1. To teacher
   2. To administrator

IX. Classroom discipline

A. School building procedures
   1. Administrative support
   2. Teacher support

IX. Classroom discipline (continued)

B. Reporting
   1. Forms
   2. Referral

C. Legal responsibilities

APPENDIX B

SUBSTITUTE TEACHER QUESTIONNAIRE
(Elementary School Level)

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DIRECTIONS: On the following pages are several statements concerning ORIENTATION PROVISIONS which are made for substitute teachers by district and/or building administrators. Please read each statement carefully and CIRCLE the appropriate number on the 5-point scale that represents your response to HOW IMPORTANT the orientation provision is for substitute teaching. Also, CIRCLE the appropriate number on the 5-point scale that represents your response to HOW ADEQUATELY the Orientation provision has been made by the Administrator of the building where you most frequently substitute.

RATING SCALE

	5	4	3	2	1
IMPORTANCE:	Extremely Important	Very Important	Of Some Importance	Of Little Importance	No Importance
ADEQUACY:	5 Extremely Important	4 Very Important	3 Of Some Importance	2 Of Little Importance	1 No Importance

I = Importance
A = Adequacy

Provisions and Needs related to Substitute Teachers	Rating Scale (Circle)
1. Information about student mental, emotional, and physical problems.	1. I= 5 4 3 2 1 A= 5 4 3 2 1
2. A city map locating the district's schools.	2. I= 5 4 3 2 1 A= 5 4 3 2 1
3. Knowledge of the school district philosophy and objectives.	3. I= 5 4 3 2 1 A= 5 4 3 2 1
4. Awareness of community cultural norms, socio-economic and ethnic composition of the school district or building.	4. I= 5 4 3 2 1 A= 5 4 3 2 1
5. Playground area assignments (times and places).	5. I= 5 4 3 2 1 A= 5 4 3 2 1
6. Floor plan of the individual school building.	6. I= 5 4 3 2 1 A= 5 4 3 2 1
7. Information concerning each student's basic mastery skill level.	7. I= 5 4 3 2 1 A= 5 4 3 2 1
8. Inclusion of substitutes at faculty informal gatherings.	8. I= 5 4 3 2 1 A= 5 4 3 2 1
9. Use of titles other than "Substitute Teacher".	9. I= 5 4 3 2 1 A= 5 4 3 2 1

10. The teacher's expectation of the substitute's role in the instructional program.	10.	I= 5 4 3 2 1 A= 5 4 3 2 1
11. An explanation of fringe benefits associated with substitute teaching.	11.	I= 5 4 3 2 1 A= 5 4 3 2 1
12. Report and Sign-in procedures in each building.	12.	I= 5 4 3 2 1 A= 5 4 3 2 1
13. Explanation of legal responsibilities associated with the substitute teaching position.	13.	I= 5 4 3 2 1 A= 5 4 3 2 1
14. An awareness of students who move to special classes during the school day.	14.	I= 5 4 3 2 1 A= 5 4 3 2 1
15. Instruction in the utilization of copy and duplicating equipment.	15.	I= 5 4 3 2 1 A= 5 4 3 2 1
16. Location and access to classroom supplies.	16.	I= 5 4 3 2 1 A= 5 4 3 2 1
17. Building procedures concerning evaluation of the students' daily class work.	17.	I= 5 4 3 2 1 A= 5 4 3 2 1
18. Availability of a classroom seating chart.	18.	I= 5 4 3 2 1 A= 5 4 3 2 1
19. Knowledge of dismissal, recess, etc., time schedules.	19.	I= 5 4 3 2 1 A= 5 4 3 2 1
20. Availability of a substitute teacher handbook or guide.	20.	I= 5 4 3 2 1 A= 5 4 3 2 1
21. Sufficient notification for being called out to work.	21.	I= 5 4 3 2 1 A= 5 4 3 2 1
22. Administrative support in student disciplinary situations.	22.	I= 5 4 3 2 1 A= 5 4 3 2 1
23. Formal and informal procedures for introducing the substitute to the regular teaching staff.	23.	I= 5 4 3 2 1 A= 5 4 3 2 1
24. Knowledge of bus schedules and student bus assignments.	24.	I= 5 4 3 2 1 A= 5 4 3 2 1
25. Knowledge of fire and disaster drill procedures in each building.	25.	I= 5 4 3 2 1 A= 5 4 3 2 1
26. Invitations and encouragement of substitute teachers to attend staff inservice and staff development meetings.	26.	I= 5 4 3 2 1 A= 5 4 3 2 1
27. Acceptance and recognition of the substitute teacher as a professional colleague.	27.	I= 5 4 3 2 1 A= 5 4 3 2 1

28. The building administrator's expectation of the substitute teacher's role is clearly defined.	28.	I= 5 4 3 2 1 A= 5 4 3 2 1
29. Lesson plans available for daily work or longer periods of teacher absence.	29.	I= 5 4 3 2 1 A= 5 4 3 2 1
30. Knowledge of the school district's philosophy and goals.	30.	I= 5 4 3 2 1 A= 5 4 3 2 1
31. Knowledge of classroom clerical duties, such as collecting money and reporting lunch counts.	31.	I= 5 4 3 2 1 A= 5 4 3 2 1
32. Knowledge of grade level subjects and activities.	32.	I= 5 4 3 2 1 A= 5 4 3 2 1
33. List of payroll dates (procedures for obtaining checks).	33.	I= 5 4 3 2 1 A= 5 4 3 2 1
34. Opportunities to provide feedback about the substitute assignment at the end of the day.	34.	I= 5 4 3 2 1 A= 5 4 3 2 1
35. An orientation session prior to opening of the school term.	35.	I= 5 4 3 2 1 A= 5 4 3 2 1
36. A substitute assignment compatible with educational background, training, & certification.	36.	I= 5 4 3 2 1 A= 5 4 3 2 1
37. Possession of a school district calendar or important dates and school related activities.	37.	I= 5 4 3 2 1 A= 5 4 3 2 1
38. Feedback from the regular teacher about the implementation of the lesson plan that was provided.	38.	I= 5 4 3 2 1 A= 5 4 3 2 1
39. Recognition of the substitute teacher by the staff as being an integral part of the building instructional program.	39.	I= 5 4 3 2 1 A= 5 4 3 2 1
40. Encouragement and appreciation of efforts from the regular staff and building and/or district administrators.	40.	I= 5 4 3 2 1 A= 5 4 3 2 1
41. Knowledge of the materials used in the grade level instructional curriculum.	41.	I= 5 4 3 2 1 A= 5 4 3 2 1
42. Pre-service conference with the building administrator.	42.	I= 5 4 3 2 1 A= 5 4 3 2 1
43. Knowledge of district and building homework policies.	43.	I= 5 4 3 2 1 A= 5 4 3 2 1
44. Administrative or Supervisory observations of the substitute.	44.	I= 5 4 3 2 1 A= 5 4 3 2 1
45. Preparation of students for a substitute teacher by the regular classroom teacher	45.	I= 5 4 3 2 1 A= 5 4 3 2 1

46. Board policy on substitute teaching assignments clearly defined.	46.	I= 5 4 3 2 1 A= 5 4 3 2 1
47. Interest in the professional growth of the substitute teacher rather than in the ability to maintain discipline and order.	47.	I= 5 4 3 2 1 A= 5 4 3 2 1
48. End of the year evaluation of the substitute's performance.	48.	I= 5 4 3 2 1 A= 5 4 3 2 1
49. Awareness of parental support toward education in the community.	49.	I= 5 4 3 2 1 A= 5 4 3 2 1
50. Check-out or sign-out procedures at the end of the day.	50.	I= 5 4 3 2 1 A= 5 4 3 2 1

APPENDIX C
PERSONAL DATA SHEET

PERSONAL DATA FOR ELEMENTARY SUBSTITUTE TEACHERS

1. Sex: _____Male _____Female

2. Age:
   ____a. 20-25
   ____b. 26-30
   ____c. 31-40
   ____d. 41-50
   ____e. 51-60
   ____f. Over 60

3. Educational Degree:
   ____a. Bachelor
   ____b. Bachelor + 15
   ____c. Master's
   ____d. Master's + 15
   ____e. Ph.D. or Ed.D.

4. Marital Status:
   ____a. Single
   ____b. Married
   ____c. Divorced
   ____d. Separated
   ____e. Widowed

5. At what GRADE LEVEL do you most frequently substitute?
   ____a. k - 1
   ____b. 2 - 3
   ____c. 4 - 5
   ____d. 6 - 7
   ____e. 8

6. How long have you been on the substitute list? _____year(s)

7. Do you substitute at the GRADE LEVEL you are most comfortable with?
   _____Yes _____No

8. In a typical school year, in how many <u>different</u> school buildings do you substitute? _____

9. If a full-time position were available in the system in which you substitute, would you apply for this position? _____Yes _____No

10. What is the TOTAL ENROLLMENT of the SCHOOL DISTRICT you most frequently get called to substitute?
    ____a. 500 - 1000
    ____b. 1001 - 1500
    ____c. 1501 - 2000
    ____d. 2001 - 2500
    ____e. 2501 - 3000
    ____f. 3001 - 3500
    ____g. 3501 - 4000
    ____h. Over 4001

11. Do you live in the SCHOOL DISTRICT where you most frequently substitute?
    _____Yes _____No

REFERENCES

Mastrian, L. A Study of Local Orientation Provisions for Substitute Teachers in Elementary Schools. Unpublished doctoral dissertation, The University of Akron, 1984.